eAnnotation of PDF proofs: a brief introduction

Introduction

Annotating PDFs ensures that your corrections are absolutely clear and that errors cannot be introduced through misinterpretation of your markup. This guide is intended to show you the essential tools you need to start using eAnnotation but if you need further information please refer to the Adobe Help files.

To start using eAnnotation make sure you have downloaded the most recent version of Acrobat Reader from *www.adobe.com*. This will give you access to the widest range of annotation tools and ensure that you are able to work with the files that we send to you. This document is written with Adobe Reader X screen shots.
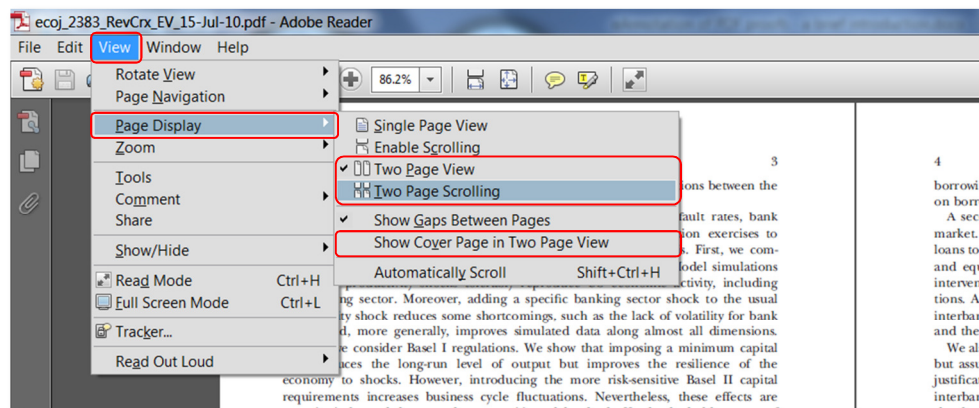
Please note:

- The proof will have been edited to house style. We retain the right to veto amendments if they are non-essential or too costly.

- *Do not* edit the PDF files even if you have the means to do so. All changes must be visible.

Viewing your documents

Viewing two page spreads

You may wish to view your document in a two page format to see the layout as it would be in print. In the **View** menu, select **Page Display**, then either **Two Page View** to see only two full pages at a time, or **Two Page Scrolling**, to allow scrolling through the document, in a two-page format.
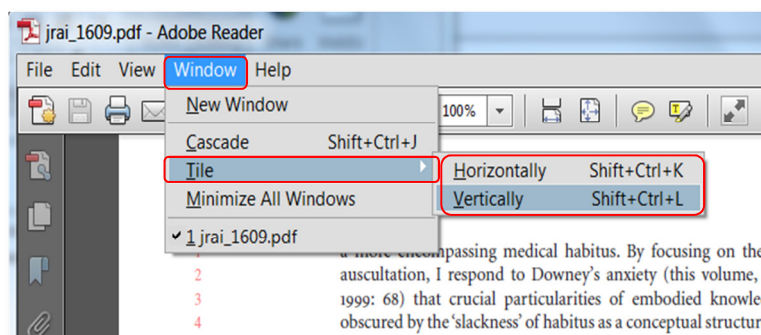

Note: If, when viewing the proof in a two page format, what should be a left hand page (verso) appears on a right hand page (recto) and vice versa, you can correct this by clicking on **Show Cover Page in Two Page View** in the same menu (see above). You should aim to have even-numbered pages on the left hand page and odd-numbered pages on the right.
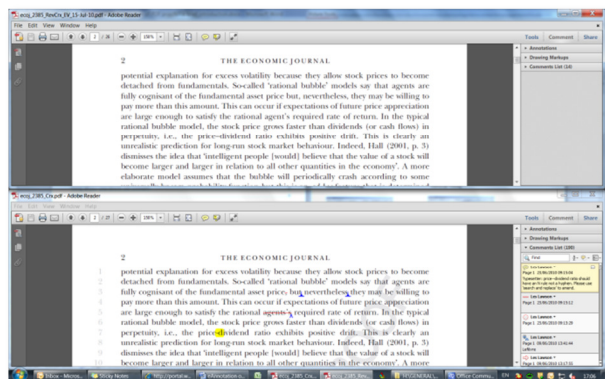
Comparing documents

You may wish to have two documents open together for comparison, for example, if you are collating your contributors' comments onto one set of PDFs.

In the **Window** menu select **Tile** and then **Horizontally or Vertically**.
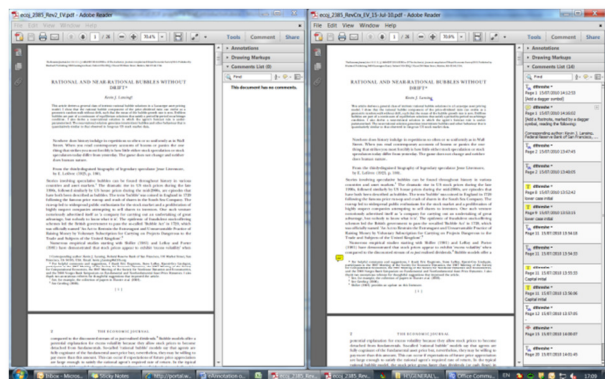
Adjust both document windows/frames to maximize screen space by drawing your cursor over the edge of the documents until it changes into a double-sided arrow. Holding the left mouse button down you can resize the document frame by moving your cursor.

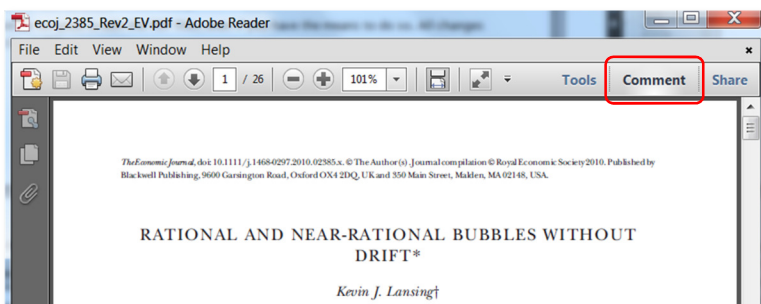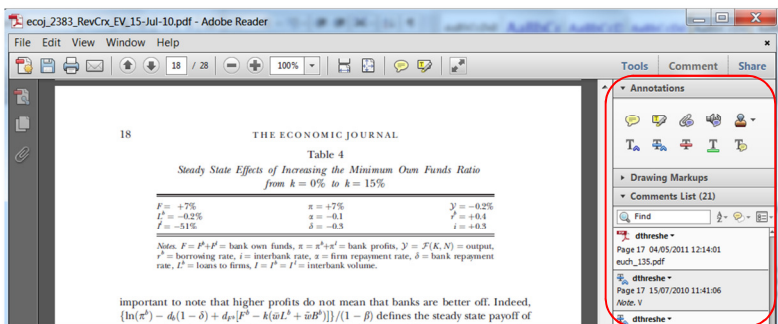Horizontal Tiling:

Vertical Tiling:
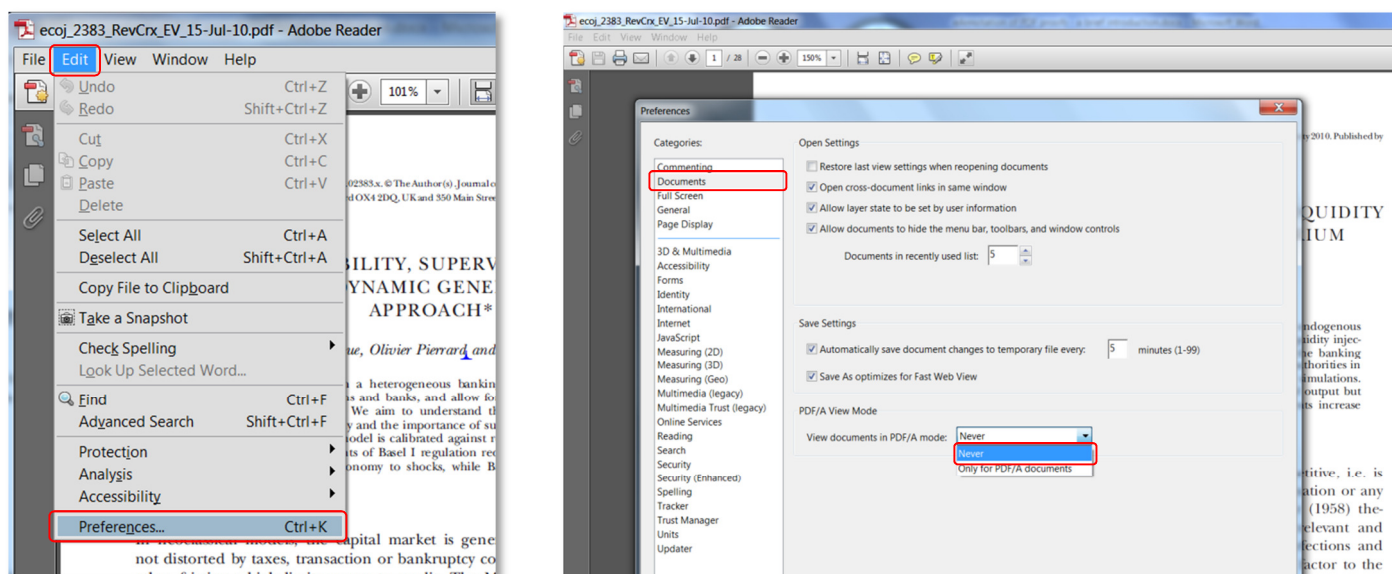

Accessing the Comments Tools

The selection of tools you can use to annotate the proof is not visible by default when you open Adobe Reader. Click on the **Comment** box in the top right corner of the page.

This opens up a panel down the right hand side of the page, made up of three sections. More information on each of these three sections will follow.
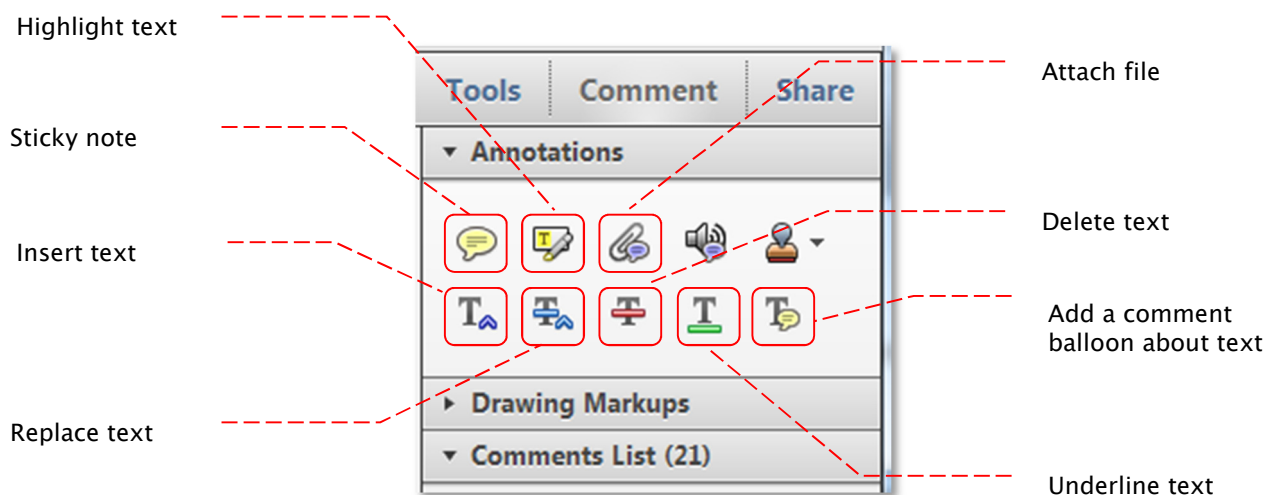
In addition you may need to change a preference setting in order to use the editing tools. In the **Edit** menu, click on **Preferences**, select the **Documents** tab in the left menu and change **PDF/A View mode** to **Never.** (Note that for the Mac version of Adobe Reader X, '**Preferences**' can be found in the main Adobe Reader menu.)

If you have done both of these actions and you still cannot annotate your proofs then please let your contact person know and they will resupply the PDFs.

Annotations Tools

When marking corrections to your proofs, the majority of tools you will use will be found in the Annotations section. From here you can highlight text, mark for text to be inserted, mark for existing text to be replaced with new text, mark text for deletion, underline text, and attach a comment balloon to a specific word or phrase.

Highlight text

Sticky note

Insert text

Replace text

Attach file

Delete text

Add a comment balloon about text

Underline text

Highlight selected text

Use the cursor to select the text to be highlighted, then click on the **Highlight text** icon in the Annotations section. The characters you had selected are highlighted in yellow. This tool can be useful when you are selecting terms for when you are compiling your index.
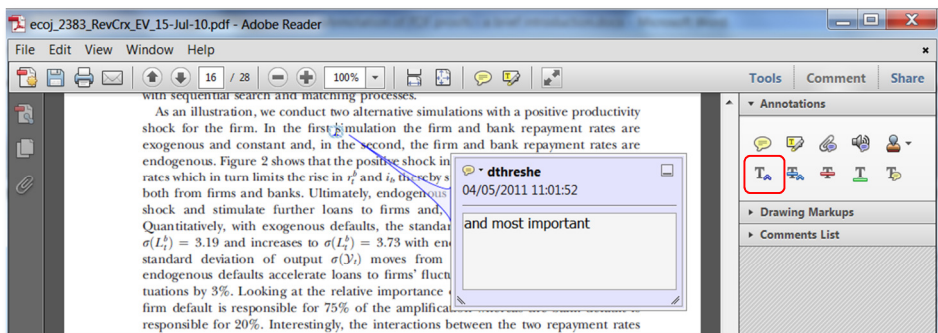

If you also need to use text edit tools on a highlighted word (e.g. to correct a spelling mistake) you can do so. Simply go to the correct position using the arrow keys on your keyboard (you won't be able to select using the mouse once the text has been highlighted).

If you need to select text hold down the Shift key and use the arrow keys to select it.

Insert text at cursor

This allows you to insert a letter, word, or phrase to the current text. Place the cursor at the insertion point, then click on the **Insert text at cursor (Ins)** icon in the Annotations section. A caret mark appears in the text and a blue comments box opens for you to type the insertion.
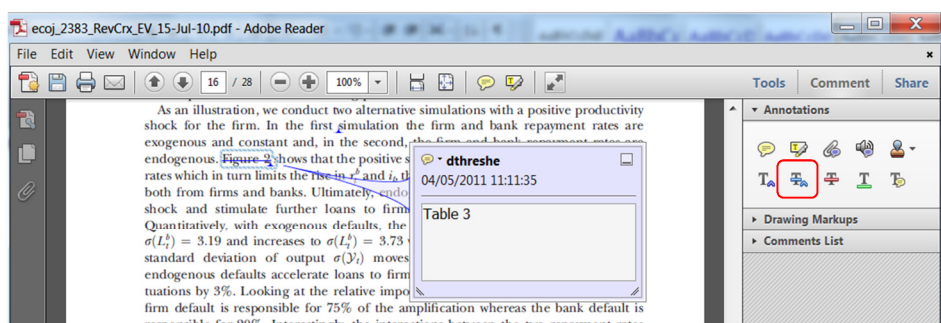

You can type italic and bold text in the insertion box by pressing CTRL-I and CTRL-B (Note: for Macs this is the 'cmd' key), and you close the box by clicking on the minimize symbol in the top right corner. The caret mark remains visible to indicate that a change is to be made, and clicking on it reopens the comment box.

Replace selected text

This allows you to replace one letter, word, or block of text. Use the cursor to select the text to be replaced, then click on the **Replace (Ins)** icon in the Annotations section.

Acrobat will score a line through the text to be replaced and insert a caret mark at the end. A comment box opens into which you can type the text for insertion.

Here, the instruction is to replace 'Figure 2' in the proofs with 'Table 3' (typed in the blue comment box). You can type italic text by pressing CTRL–I (the "Ctrl" and "I" keys on the keyboard simultaneously) and bold text by pressing CTRL–B. To switch off italic/bold, press CTRL–I/CTRL–B again. Close the comment box by clicking on the minimize symbol in the top right corner. The blue line and the caret mark remain visible to indicate that a change is to be made, and clicking on either reopens the comment box.
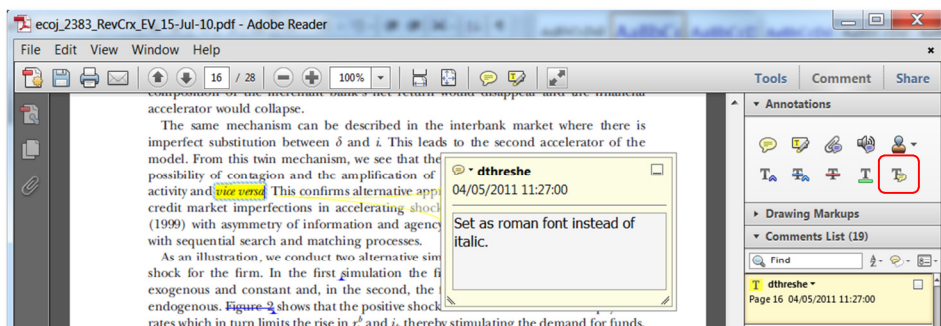
Cross out text for deletion

This allows you to delete a letter, word, or phrase in the current text. Use the cursor/mouse to select the text to be deleted, then click on the **Strikethrough (Del)** icon in the Annotations section. A red line is scored through the text.

Underline selected text

Please don't use this tool for annotating PDFs. Although underlining is the conventional indication for text to be set in italic type, we prefer that you use the **Add note to text** tool to highlight this instead.

Add note to text

Use the cursor to select the text to be highlighted, then click on the **Add note to text** tool icon in the Annotations section. This works in the same way as the **Sticky note** tool except that instead of placing a balloon at the cursor, it highlights the selected text in yellow.
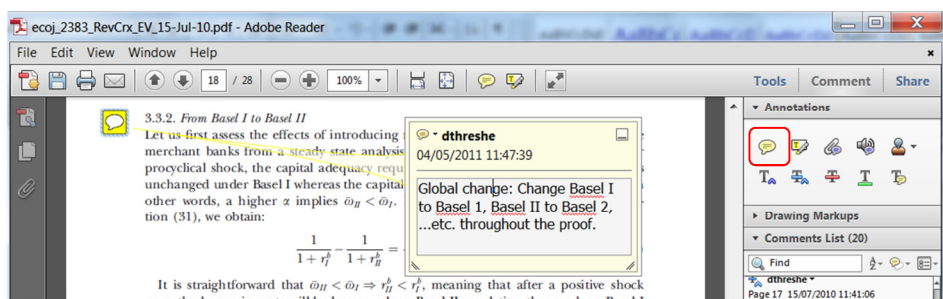
It can be a useful way of asking us to check that a font is correct or telling us to change a word or phrase to bold or italic.

Add sticky note

This tool allows you to attach an electronic Post-It note to the document. It should not be used for editing. However, the note can be used for general comments rather than specific line corrections. You might, for example, want to ask a co-author to review a passage for sense or ask us to make a global change (e.g. from 'decision making' to 'decision-making').

Click on the **Add sticky note** icon in the Annotations section, then click on the text or margins where you wish your comment to appear. A small balloon icon will be placed at the cursor, linked to a box into which you can type your comments:

Type your comment and then click on the minimize symbol in the top right corner. The balloon icon will remain visible, and you can open (and edit) the note by double clicking on this icon.

If you are responsible for collating comments from contributors, co-editors or co-authors then you will find the 'Options' button, in the top left corner of the box, useful for replying to comments or for deleting, accepting, or rejecting comments. You can also change the shape of the balloon to represent different types of comment. Please note: any comment intended for someone other than the publisher or our freelance suppliers (i.e. Project Managers, Proofreaders etc.) must be removed before the file is returned to us.

Inserting special characters

In general, if a special character has a keyboard shortcut in Word, this will also work in a note box (e.g. type ALT-0150 for an n-dash or ALT-0151 for an m-dash. If you don't know the shortcut or there isn't one, type the special character in Word and copy and paste it into the note box. (Note: for Macs, use the 'cmd' key instead of 'ALT'. Shortcuts may be different to those on a PC).
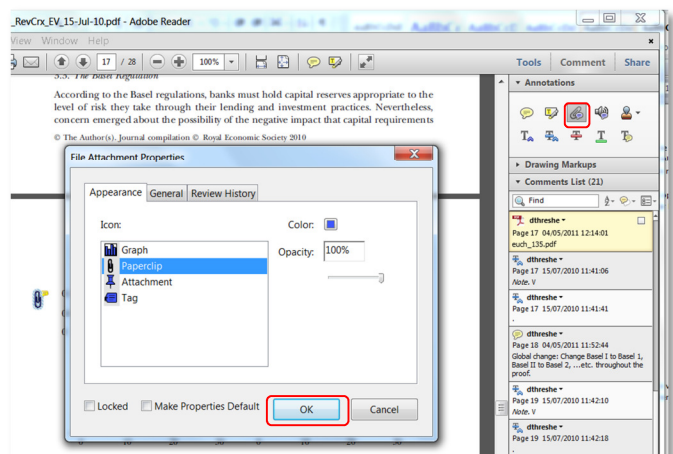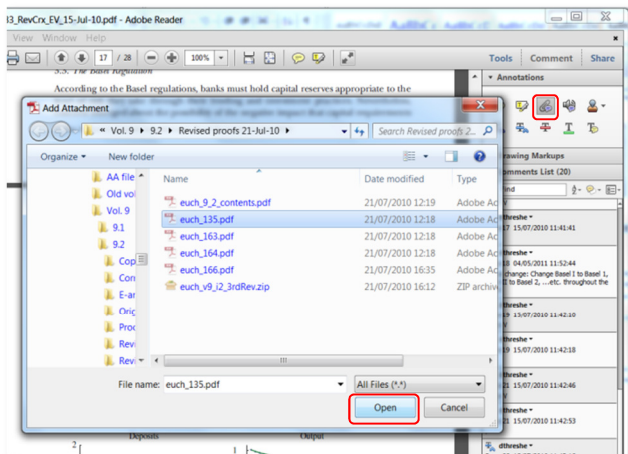
Alternatively, for more complex special characters, it may be better to attach a file with the character showing correctly (see below for instructions on how to do this).

Attaching documents

It's possible to attach accompanying files to your annotated PDF. These files may be replacement figures, large sections of text to be inserted, or text including more complex special characters.

Click on the **Attach file** icon in the Annotations section, then click in the text or the margin close to the point to which the file relates.
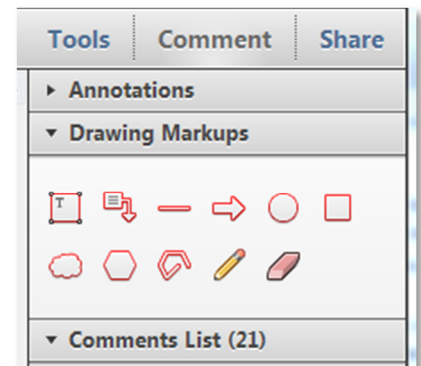
A pop up box will appear, from where you can select the file to be attached . Click open once you have the file selected, then confirm the properties for the attached file (in particular how you want the attachment marker to appear in the proof).

Click OK and the icon for the attachment appears in the proof.
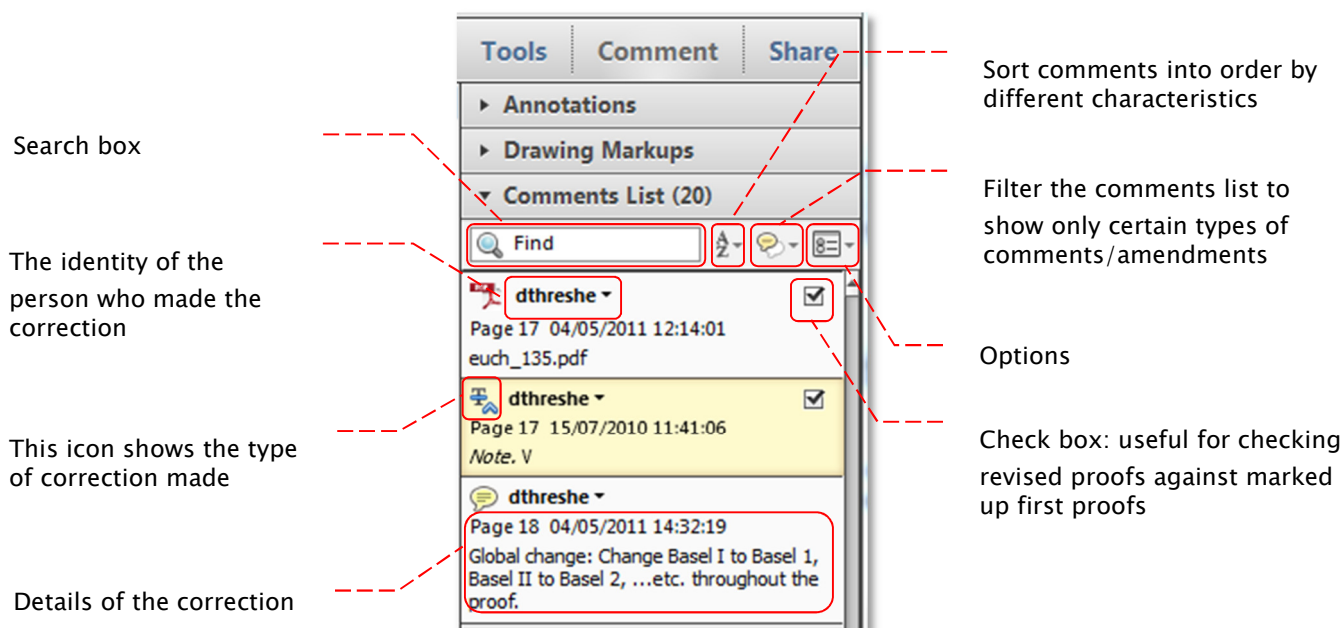
Drawing markups tools

The next section in the Comment panel is the **Drawing Markups** section. The drawing tools in this section can be useful for highlighting sections of the text, tables, or figures that are to be moved and highlighting where they are to be moved to. You can draw lines, ellipses, rectangles, cloud shapes, or free-form shapes from this section.

Comments List

Expanding the **Comments List** gives you a view of all amendments and comments marked up in the proof. Clicking on each item in the Comments List highlights the corresponding markup in the text.

Search box

The identity of the person who made the correction

This icon shows the type of correction made

Details of the correction

Sort comments into order by different characteristics

Filter the comments list to show only certain types of comments/amendments

Options

Check box: useful for checking revised proofs against marked up first proofs
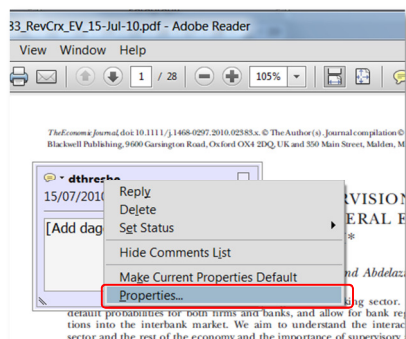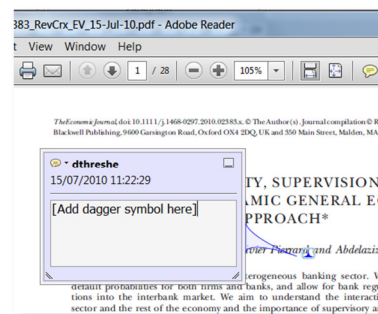
Check boxes

When checking revised proofs against the corrected first proof (for Project Managers, Proofreaders, and Production Editors), you may find it useful to tick off corrections as you check that they have been made. Selecting an item in the Comments List brings up an empty check box in the top right hand corner. Click on this to tick the box and again to untick it. Ticked boxes stay marked when you click on a new item in the list.

Changing the identity to whom amendments are attributed

(e.g. to differentiate between corrections made by different people or to keep comments anonymous).
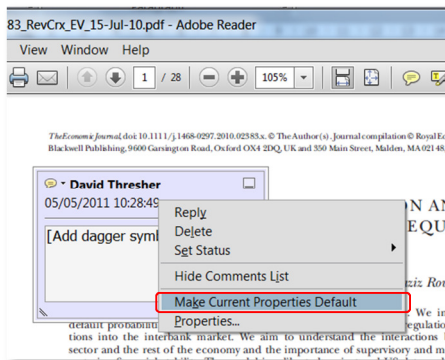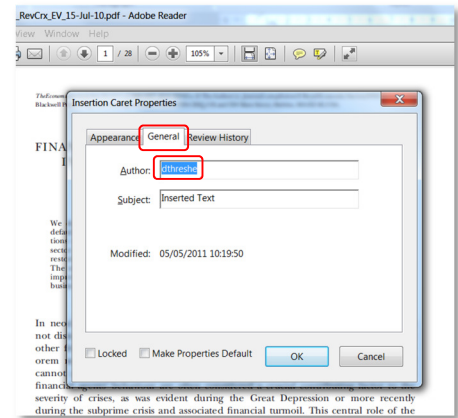
If you wish to change the identity marked in the annotations, it's best to do this before you start marking changes, as changing it in all items in the Comments List after amendments have been made can be time consuming. This can be done as follows:

1. Mark up the first amendment as usual. Be sure to make an amendment that creates a box into which text can be entered (i.e. Add sticky note, Insert text, Replace text, Add note to text, etc.)

2. Right click in the top section of the box (where the date, time, and author of the correction are included) and select **Properties** in the menu that appears.
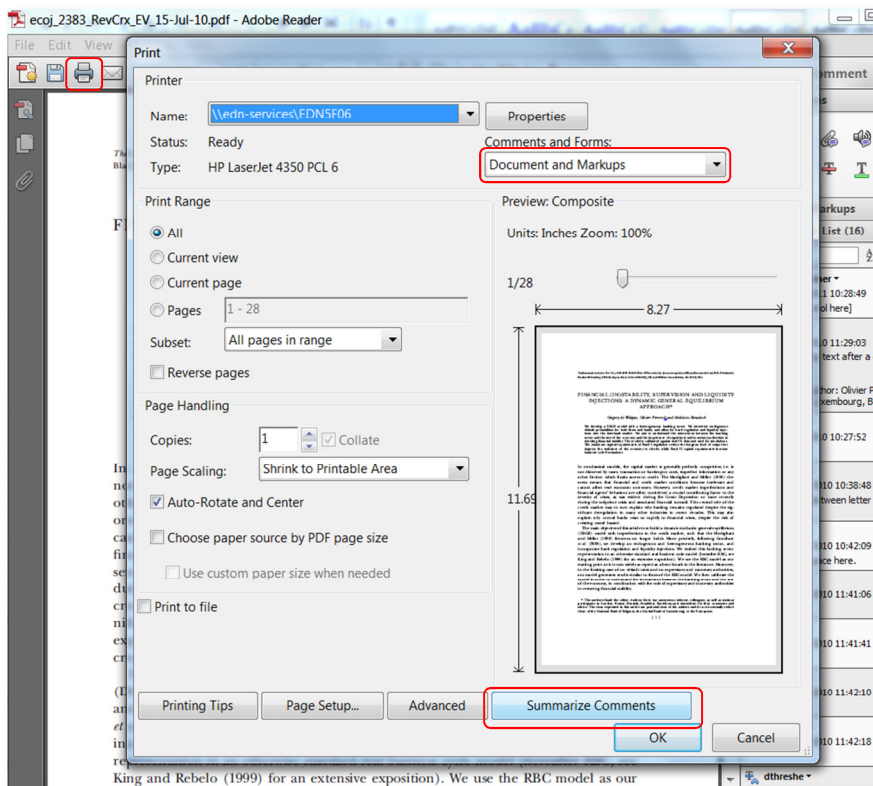
3. On the **General** tab of the box that appears, you'll find the author name. Change this to the name of the person making corrections. If the person marking up corrections wishes to remain anonymous, they can either type 'anonymous' or else delete the author name completely. Click OK once done.

4. Note that this only changes the author name in the box first clicked on. To apply the author name change to all notes/comments boxes (going forward, not retrospectively, i.e. this will not change the author name in notes/comments that have already been created), right click the date, time, and author name section of the box for which you have just changed the author name. In the menu that appears click on **MakeCurrentPropertiesDefault**.

You have now changed the author name for all subsequent comments/notes boxes. To change the author name in comments/note boxes that have already been created follow steps 1-3 above for each individual note/comment.

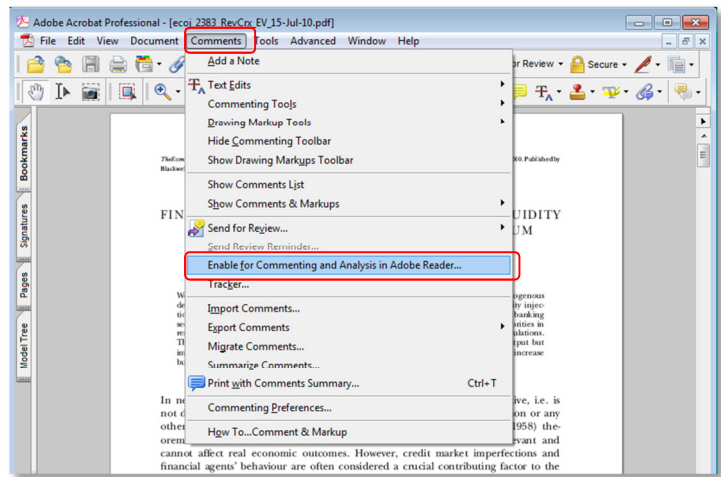Remember to save your changes when you close the document.

Printing

In Adobe Reader X it is possible to print out marked up comments at the same time as printing the document. To do this, click the print icon on the top toolbar (or else, in the **File** menu click **Print**),

In the **Comments and Forms** section of the box that appears, select **Document and Markups** and, at the bottom of the page, click on the **Summarize Comments** button. Once all other details are correct click OK to print.

Troubleshooting

If someone has annotated a PDF using the full version of Acrobat, it is easy for them to save the document in such a way that it disables the comment tools for use in Reader. If you receive a PDF where this has happened, an error message will pop up to say that "the document has been changed and the rights to enable special features in Adobe Reader are no longer valid".

In this case, the person who sent you the PDF needs to go back into the file in the full version of Acrobat, click on the **Comments** menu, and then select **Enable for Commenting and Analysis in Adobe Reader**. If they then save the file and resend it to you, you should be able to annotate the PDFs as normal.

1. Introduction

Adobe Reader is the standard tool used for electronic document sharing. It is the only PDF file viewer that can open and interact with all PDF documents. In order to utilize its functional properties Wiley's page proofs are 'Comment Enabled', a feature that allows you to make comments in the PDF documents using Adobe Reader. You can download Adobe Reader at *www.adobe.com*. Please note these screen shots have been taken from a Windows machine. There may be slight differences for a Mac.

2. Procedure

The PDF will come to you with commenting enabled. If you come across any problems with commenting you can check whether the comment enabling has worked by right clicking the PDF to find 2 options. Option 1: click the Tools option and scroll down to "Comment & Markup" (Figure A) and see if the available options shown below appear; option 2: right click the PDF to find "Add Sticky Note" as the first option. If either of these options works then the PDF is comment enabled.
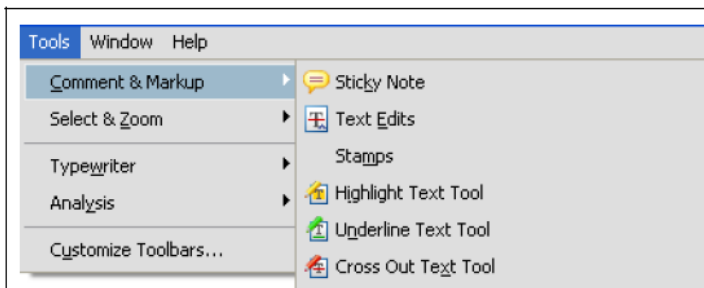
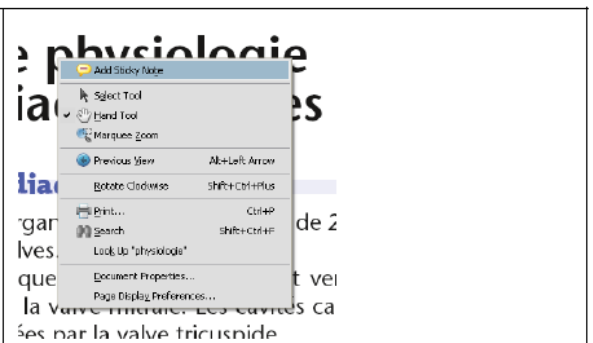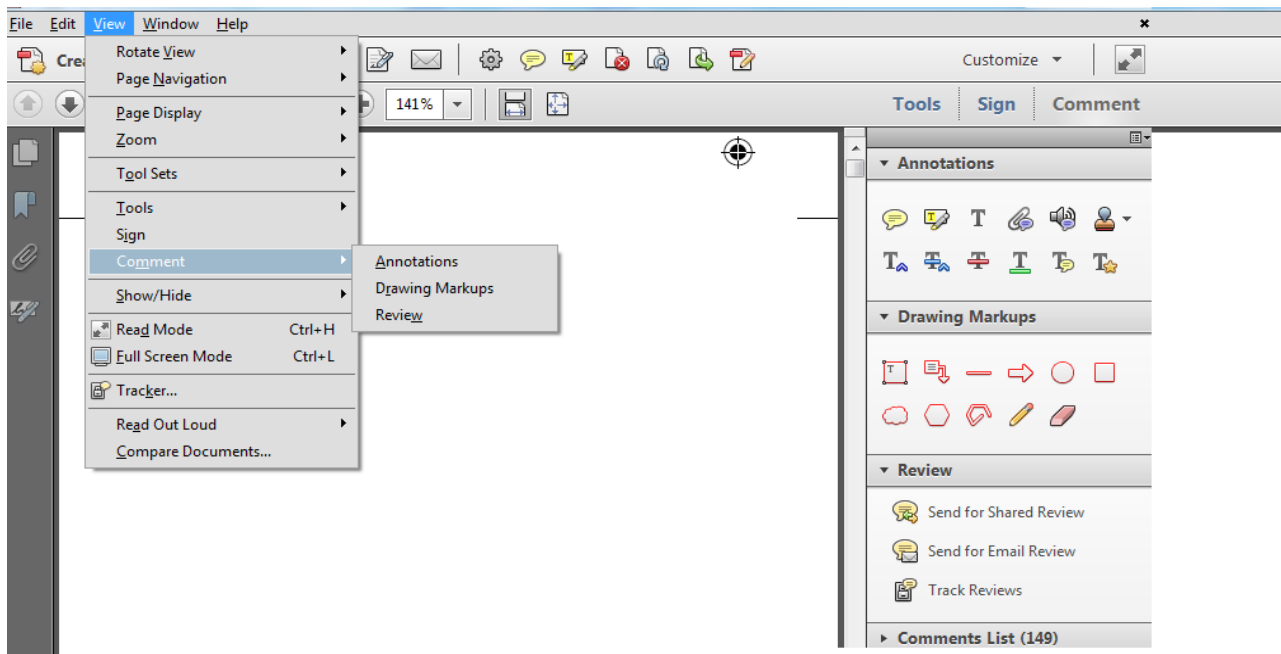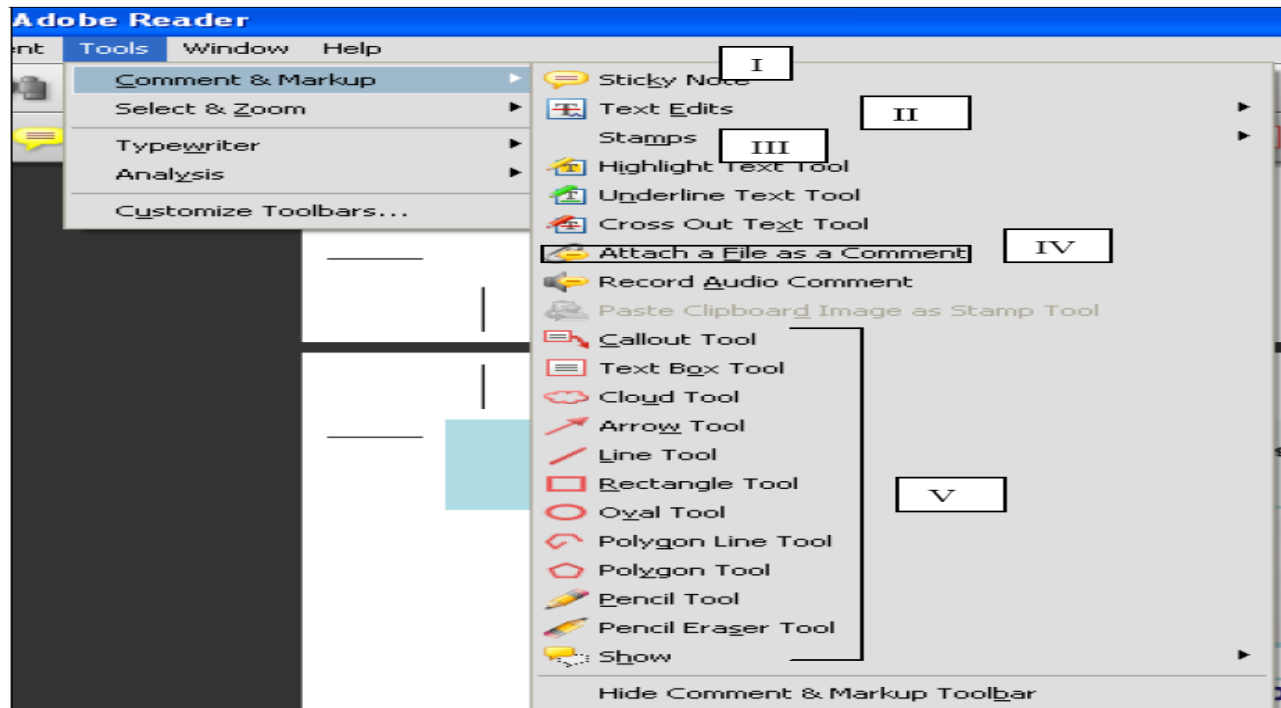Figure A: Option 1 to check Comment Enabled PDF

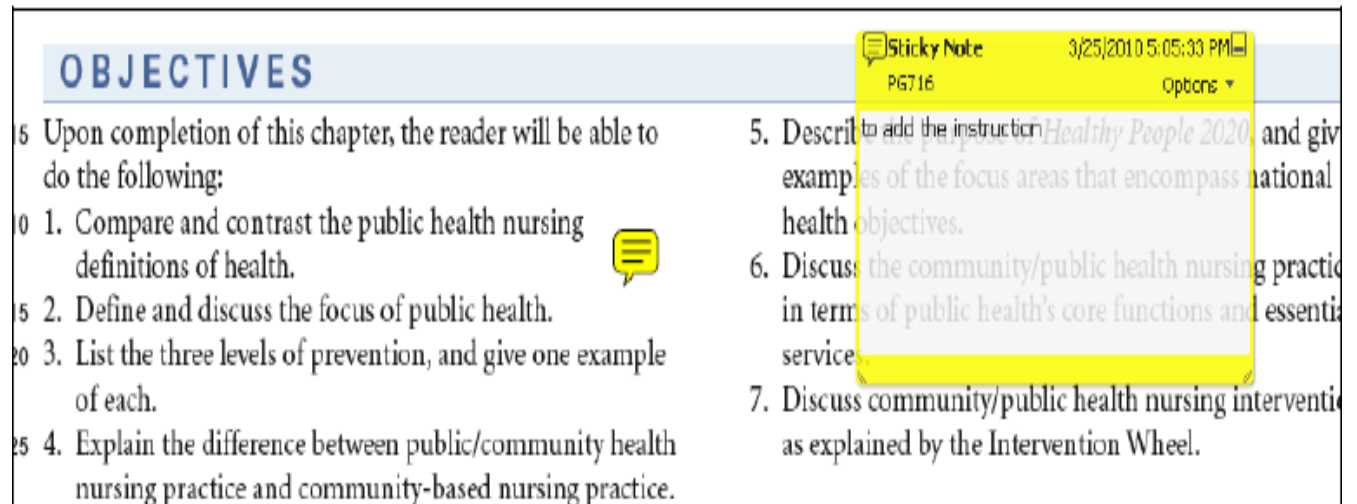Figure B: Option 2 to check Comment

3. Options in Adobe Reader

Adobe Reader

nt   Tools   Window   Help

Comment & Markup ▶
Select & Zoom ▶
Typewriter ▶
Analysis ▶
Customize Toolbars...

| I |

Sticky Note
Text Edits | II | ▶
Stamps | III | ▶
Highlight Text Tool
Underline Text Tool
Cross Out Text Tool
Attach a File as a Comment | IV |
Record Audio Comment
Paste Clipboard Image as Stamp Tool
Callout Tool
Text Box Tool
Cloud Tool
Arrow Tool
Line Tool
Rectangle Tool
Oval Tool | V |
Polygon Line Tool
Polygon Tool
Pencil Tool
Pencil Eraser Tool
Show   ▶

Hide Comment & Markup Toolbar

File   Edit   View   Window   Help   ✕

Rotate View ▶
Page Navigation ▶

Crea

Page Display ▶
Zoom ▶

141%

Tool Sets ▶

Tools   Sign   Comment

Tools ▶
Sign

▼ Annotations

Comment ▶ | Annotations
Drawing Markups
Review

Show/Hide ▶

Read Mode   Ctrl+H
Full Screen Mode   Ctrl+L
Tracker...

Read Out Loud ▶
Compare Documents...

T T T

▼ Drawing Markups

▼ Review

Send for Shared Review

Send for Email Review

Track Reviews

▶ Comments List (149)

4. Role of Icons in Comment and Mark up tool

I. Sticky Note tool (Sticky Note **)**

This tool enables adding instructions and corrections in the file. Select the icon and your cursor will change to the sticky note icon. Click where the change is to be done. A sticky note pane will open into which you can key your comment or correction.
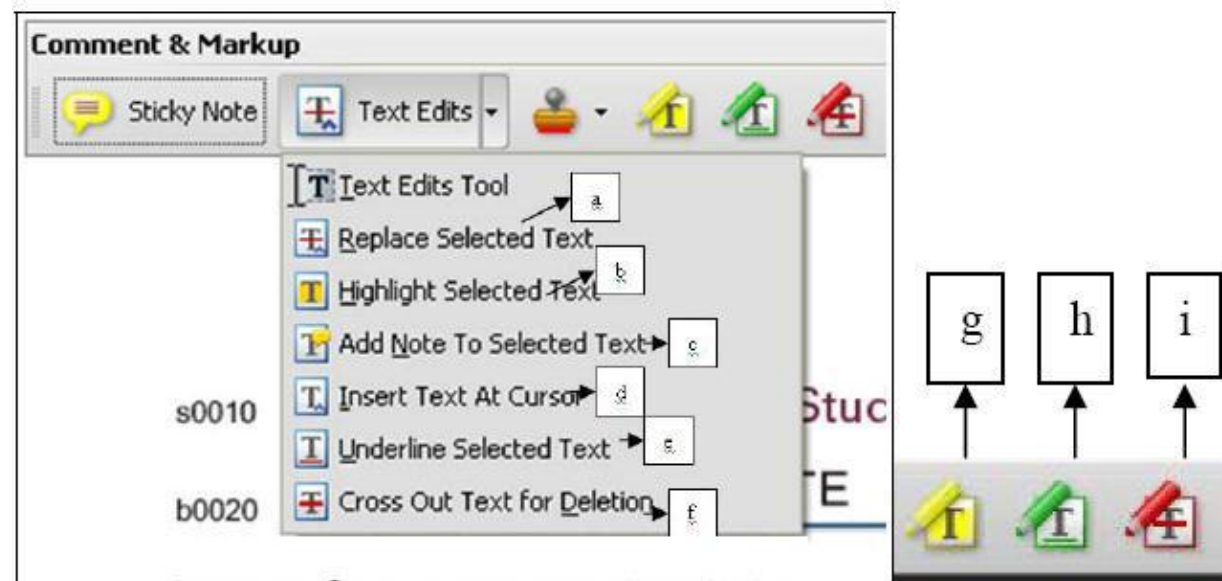

II. Text Edit tool and its options

5. Options available in text edit tool bar

These screen shots reveal the available options and their usages. Textual changes could be carried out using the Text Edit Tool.

a. Replace Selected Text	Click the text edit tool icon ( ) and select the text which needs to be replaced and then click Replace Selected Text. Selected text will be replaced with a pop up note (or) select the text and begin typing, selected text will be replaced with a pop up note		
b. Highlight Selected Text	Click the text edit tool icon ( ) and select the text which needs to be highlighted and then click Highlight Selected Text. Selected text will be highlighted		
c. Add Note To Selected Text	To add a note to Selected Text, click the text edit tool icon ( ) and select the text. A note will be added to selected text.		
d. Insert Text At Cursor	Click the text edit tool icon ( ) and pace the cursor where the insertion to be carried out. Text will be inserted at the cursor with a pop up note (or) place the cursor where the text needs to be inserted and begin typing text will be inserted with a pop up note.		

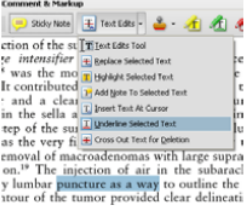|			
e. [T] Underline Selected Text	Click the text edit tool icon ( ) and select the text which needs to be underlined and then click Underline Selected Text. Selected text will be underlined.	Comment & Markup ... Sticky Note ... Text Edits ... Text Edits Tool ... Replace Selected Text ... Highlight Selected Text ... Add Note To Selected Text ... Insert Text At Cursor ... Underline Selected Text ... Cross Out Text for Deletion ... removal of macroadenomas with large supra on.[19] The injection of air in the subarach y lumbar puncture as a way to outline the ntour of the tumor provided clear delineati	The injection of air in the ﬂbar puncture as a way to ou of the tumor provided clear
f. [+] Cross Out Text for Deletion	Click the text edit tool icon ( ) and select the text which needs to be deleted and then click Cross Out Text for Deletion (or) select the text and press backspace selected text will be crossed out.	Comment & Markup ... Sticky Note ... Text Edits ... Text Edits Tool ... Replace Selected Text ... Highlight Selected Text ... Add Note To Selected Text ... Insert Text At Cursor ... Underline Selected Text ... Cross Out Text for Deletion ... removal of macroadenomas with large supra sion.[19] The injection of air in the subarach by lumbar puncture as a way to outline the	The injection of air in t bar ~~puncture as a way~~ to
g.	Select the highlighted text icon and apply directly where the text needs to be highlighted in the text	<mark>Laterally located lesions may require partial wing resection to ensure complete excision of the microadenoma. Posteriorly</mark> located lesions should not be pulled out but	
h.	Select the underline text icon and apply directly where the text needs to be underlined in the text	also useless in the identification of the bony landmarks, such as the anterior nasal spine and the vomer bone, that guide the surgeon towards the sella. Only in cases of large	
i.	Select the cross out text icon and apply directly where the text needs to be crossed out in the text	52%) directly into the tumor with a 26-gauge needle is ~~an alternative. The opaque perfusion of the entire tumor~~ ~~outlines its boundaries~~ for the placement of the curettes into the tumoral cavity. Progressive excision of the opaci	

5